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Looking Back on '88

Takeovers, Sales, People Moves, Bestsellers, Best Books

The State of the Paper Market • Top Authors Look Ahead

Publishers Weekly

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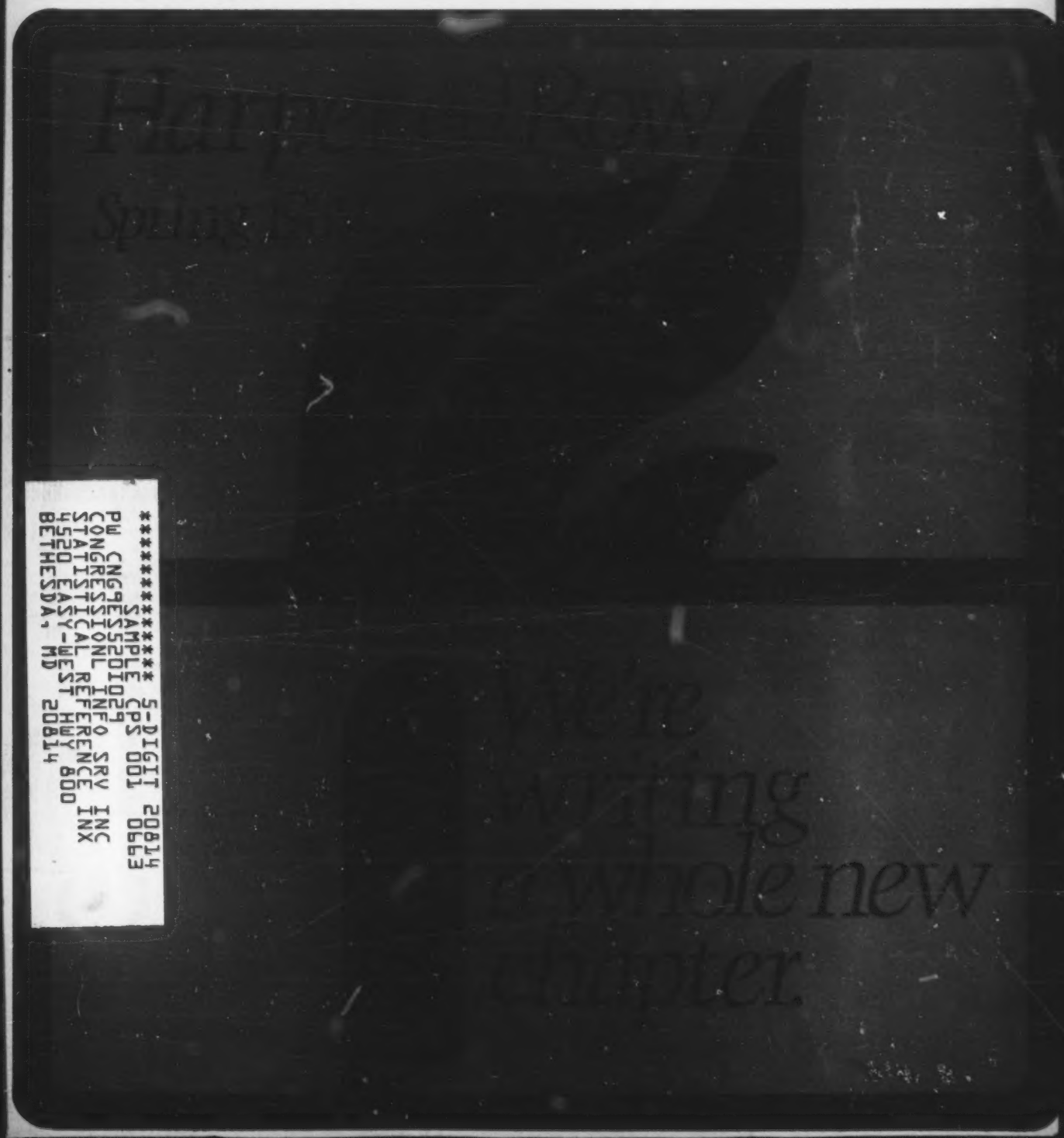

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Longest-Running Hardcover Bestsellers for 1988

The books on these *PW* hardcover and paperback bestseller lists are those that lasted longest on our regular weekly bestseller lists in 1988. This list of fiction and nonfiction titles does not necessarily reflect the year's bestselling hardcover books in terms of actual sales. Some titles that achieve bestsellerdom in the last few months of the year will have the highest rate of sales, because of holiday purchase. The 1988 list of longest-running hardcover bestsellers include 16 fiction titles and only nine nonfiction titles that made the weekly charts 15 times or more. In past years, at least 15 nonfiction titles enjoyed a longevity of at least 15 weeks on the weekly charts.

FICTION

		#Wks. on '88 List	#Wks. on '87 List
1	* **The Bonfire of the Vanities.** Tom Wolfe. Farrar, Straus & Giroux (11/87; $19.95).	48	7
2	**Love in the Time of Cholera.** Gabriel García Márquez. Knopf (4/88; $19.95).	34	–
3	**The Shell Seekers.** Rosamunde Pilcher. St. Martin's (1/88; $19.95).	33	–
4	* **The Icarus Agenda.** Robert Ludlum. Random House (3/88; $19.95).	25	–
	* **Alaska.** James Michener. Random House (6/88; $22.50)	25	–
5	* **Zoya.** Danielle Steel. Delacorte (6/88; $19.95).	21	–
6	* **The Cardinal of the Kremlin.** Tom Clancy. Putnam (7/88; $19.95)	20	–
7	**Till We Meet Again.** Judith Krantz. Crown (9/88; $19.95).	19	–
8	**The Patriot Games.** Tom Clancy. Putnam (7/87; $19.95).	18	21
	* **The Tommyknockers.** Stephen King. Putnam (11/87; $19.95)	18	4
	Treasure. Clive Cussler. Simon & Schuster (4/88; $18.95)	18	–
9	**Presumed Innocent.** Scott Turow. Farrar, Straus & Giroux (7/87; $18.95).	17	26
10	**Beloved.** Toni Morrison. Knopf (9/87; $18.95).	16	14
	Kaleidoscope. Danielle Steel. Delacorte (11/87; $18.95)	16	9
	2061: Odyssey 3. Arthur C. Clarke. Del Rey (1/88; $17.95)	16	3
	Rock Star. Jackie Collins. Simon & Schuster (4/88; $19.95)	16	–

NONFICTION

		#Wks on '88 List	#Wks on '87 List
1	* **The 8-Week Cholesterol Cure.** Robert W. Kowalski. Harper & Row (3/87; $17.95).	49	20
2	* **Trump: The Art of the Deal.** Donald J. Trump with Tony Schwartz (12/87; $19.95).	43	1
3	**Swim with the Sharks Without Being Eaten Alive.** Harvey Mackay. Morrow (3/88; $15.95).	36	–
4	**Thriving on Chaos: A Handbook for a Management Revolution.** Tom Peters. Knopf (10/87; $17.95).	35	7
	* **A Brief History of Time: From the Big Bang to Black Holes.** Stephen W. Hawking. Bantam (4/88; $18.95).	35	–
5	**Rise & Fall of the Great Powers.** Paul Kennedy. Random House (1/88; $24.95).	30	–
6	* **Talking Straight.** Lee Iacocca with Sonny Kleinfield. Bantam (6/88; $21.95).	24	–
7	**Love, Medicine & Miracles.** Bernie S. Siegel. Harper & Row (5/86; $17.95).	20	33
8	**Senatorial Privilege: The Chappaquidick Cover-Up.** Leo Damore. Regnery Gateway (6/88; $21.95).	15	–

* These titles achieved the #1 spot during their 1988 presence on *PW*'s Bestseller List.

Longest-Running Paperback Bestsellers for 1988

Reprints of hardcover bestsellers dominated the mass market list, while humor was the most prevalent category on the trade side, followed by books on health and alternative healing. In 1987, 19 mass market titles and 15 trade paperbacks made the weekly charts 10 or more times. This year, the tally was higher—25 for mass market and 21 for trade. It was the fifth appearance for *The Road Less Traveled* on these lists, the third time as #1.

MASS MARKET

		#Wks. on '88 List	#Wks. on '87 List
1	**The Prince of Tides.** Pat Conroy. Bantam (1/88; $4.95).	37	3
2	* **Presumed Innocent.** Scott Turow. Warner (5/88; $4.95).	29	–
3	**Small Sacrifices.** Ann Rule. NAL/Signet (7/88; $4.95).	20	–
4	* **Fine Things.** Danielle Steel. Dell (3/88; $4.95).	17	–
	* **Patriot Games.** Tom Clancy. Berkley (8/88; $4.95).	17	–
5	* **Communion.** Whitley Strieber. Avon (2/88; $4.95).	13	–
	* **Destiny.** Sally Beauman. Bantam (2/88; $4.95).	13	–
	Over the Edge. Jonathan Kellerman. NAL/Signet (3/88; $4.95).	13	–
	* **Misery.** Stephen King. NAL/Signet (6/88; $4.95).	13	–
	* **Hot Flashes.** Barbara Raskin. St. Martin's Press (8/88; $4.95).	13	–
6	**Windmills of the Gods.** Sidney Sheldon. Warner (11/87; $4.95).	12	6
	Weep No More, My Lady. Mary Higgins Clark. Dell (7/88; $4.95).	12	–
	Sphere. Michael Crichton. Ballantine (8/88; $4.95).	12	–
7	* **The Eyes of the Dragon.** Stephen King. NAL/Signet (1/88; $4.50).	11	–
	Sarum. Edward Rutherfurd. Ballantine (8/88; $5.95).	11	–
	* **Heaven and Hell.** John Jakes. Dell (10/88; $5.95).	11	–
	Her Mother's Daughter. Marilyn French. Ballantine (10/88; $5.95).	11	–
	* **Murder in the CIA.** Margaret Truman. Fawcett Crest (10/88; $4.95).	11	–
8	* **Garden of Shadows.** V. C. Andrews. Pocket (11/87; $4.95).	10	7
	The Ladies of Missalonghi. Colleen McCullough. Avon (4/88; $3.95).	10	–
	Dirk Gently's Holistic Detective Agency. Douglas Adams. Pocket (5/88; $4.50).	10	–
	Elvis & Me. Priscilla Presley. Berkley (2/88; $4.50).	10	–
	* **Fallen Hearts.** V. C. Andrews. Pocket (8/88; $4.95).	10	–
	Heiress. Janet Dailey. Fawcett Crest (7/88; $4.95).	10	–
	* **Team Yankee.** Harold Coyle. Berkley (9/88; $4.95).	10	–

TRADE

		#Wks on '88 List	#Wks on '87 List
1	**The Road Less Traveled.** M. Scott Peck. Touchstone/S & S (1983, $9.95).	50	51
2	* **Calvin & Hobbes.** Bill Watterson. Andrews & McMeel (4/87; $6.95).	41	37
3	* **Dianetics, Revised Edition.** L. Ron Hubbard. Bridge (9/85; $4.95).	38	50
4	**Codependent No More.** Melody Beattie. H & R/Hazelden (5/87; $8.95).	36	–
5	* **Something Under the Bed Is Drooling.** Bill Watterson. Andrews & McMeel (5/88; $6.95).	30	–
6	* **Love, Medicine & Miracles.** Bernie S. Siegel. H & R/Perennial (6/88: $8.95).	27	–
7	**The Power of Myth.** Joseph Campbell. Doubleday (5/88; $19.95).	20	–
8	**The Closing of the American Mind.** Allan Bloom. S & S/Touchstone (5/88; $5.95).	19	–
9	**You Can Heal Your Life.** Louise L. Hay. Hay House (10/85; $10).	15	–
10	* **Night of the Crash-Test Dummies.** Gary Larson. Andrews & McMeel (8/88; $5.95).	14	–
	Tales Too Ticklish to Tell. Berke Breathed. Little, Brown (9/88; $7.95).	14	–
11	**The Book of Questions.** Gregory Stock. Workman (6/87; $3.95).	13	29
12	* **The Arthur Young Tax Guide 1988.** Peter W. Bernstein. Ballantine (12/87; $10.95).	12	–
13	**West with the Night.** Beryl Markham. North Point (1983; $12.50).	11	43
	* **The World Almanac & Book of Facts 1988.** World Almanac/Pharos (12/87; $5.95).	11	1
	* **The Dark Tower: Gunslinger.** Stephen King. NAL/Plume (9/88; $10.95).	11	–
	* **The Essential Calvin & Hobbes.** Bill Watterson. Andrews & McMeel (10/88; $12.95).	11	–
14	* **The Far Side Observer.** Gary Larson. Andrews & McMeel (10/87; $5.95).	10	8
	The Fatal Shore. Robert Hughes. Vintage (2/88; $9.95).	10	–
	* **Garfield Worldwide.** Jim Davis. Ballantine (3/88; $6.95).	10	–
	Beloved. Toni Morrison. NAL/Plume (9/88; $8.95).	10	–

* These titles achieved the #1 spot during their 1988 presence on *PW*'s Bestseller List.

EDITED BY PAUL SWEETING AND JOHN ZINSSER

1988: Steady As She Goes

BY PAUL SWEETING

Compared to the tumult of 1987, 1988 seemed a positively mild year in the spoken audio publishing business. Big fish were not eating little fish, no major players went under and what trends were evident played themselves out at a leisurely pace. The industry also did not produce the hoped for break-out hit that would put spoken-word audio on the publishing map, the way Jane Fonda's *Workout* once put nontheatrical programming (and its publisher, Karl Home Video) on the home video map in 1983.

"Steady" was the watchword for 1988, as in "it was a steady business," or "growth was steady," or "we're making steady progress." Steadiness, of course, is not necessarily a bad thing for a business, but it can sometimes feel like only half a loaf. As one audio executive put it while voting with the majority, "steady sounds better than flat."

Spoken-word audio publishing was roughly a $100 million business in 1988, according to research provided to *PW* by one publisher. That figure is split fairly evenly between retail and direct-mail sales, but includes Nightingale-Conant, who alone, according to various estimates, accounted for at least 80% of the direct-mail business. Excluding Nightingale's operation, the retail market is at least five times the size of the direct-mail business.

That retail market, however, is not particularly well developed, as illustrated by *PW*'s survey of Christmas business (Dec. 23). When asked to name the spoken-word audio titles currently selling best in their stores, retailers were as likely as not to mention *categories* that were performing well, rather than particular titles. This was especially true of independent booksellers. Some even went so far as to suggest that the notion of a "bestseller" is simply not yet applicable to the spoken audio business.

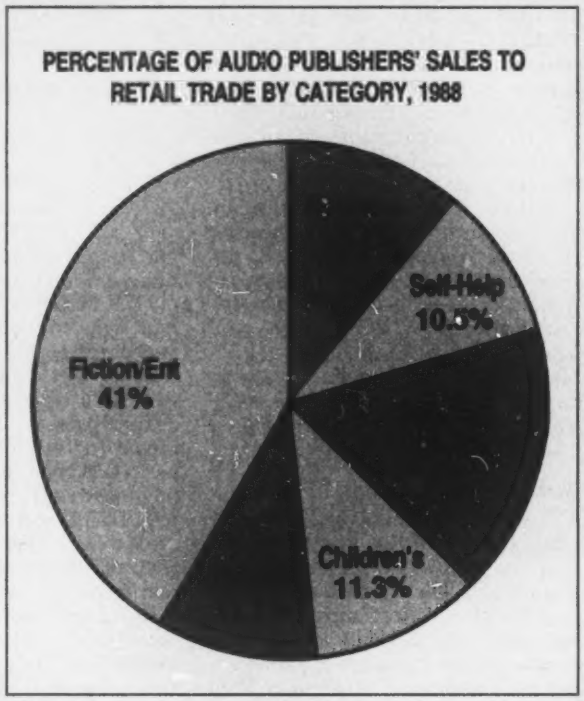
A typical comment comes from Nick Setka, manager of San Francisco's Cody's Books. "We don't sell that many of any one [title]," he said, adding "although taken as a whole, we do quite well." Similarly, Peggy Taylor, co-owner and manager of Webster's, The Reader's Bookstore and Cafe in Milwaukee, called audio "a real this-and-that market."

Even where specific titles were cited, retailers often prefaced their remarks by stressing the fundamentally egalitarian nature of the business. "There really isn't one that stands out," Pamela Turner, co-owner of Under Cover Books, began before adding "but we are still selling [Bantam's] *Prince of Tides*." Richard Howorth, owner of Square Books in Oxford, Miss., noted that "tape sales are diverse," before singling out Caedmon's *Love, Medicine & Miracles*.

Publishers offer various explanations for why spoken audio seems to be regarded generically by retailers. Audio, says Bantam's Jenny Frost, "turns less often than books, so retailers are doing inventory less frequently. That tends to make them less aware of specific titles. Also, there was no real big title this year that stands out in retailers' minds, the way the Garrison Keillor titles did the year before."

George Hodgkins of Audio Renaissance believes that since spoken word is still treated as a sideline by many retailers, they simply pay less attention to it. "I doubt [retailers] could tell you their bestselling greeting cards or magazines either," he says. But Hodgkins also detects a curious paradox in how retailers regard the format. "It's certainly a title business on sell-in," he notes. "Retailers are not buying audio by the pound. But for some reason, that perception is not carried over to the sell-out."

One reason for this paradox may be consumers' continuing unfamiliarity with spoken-word audio in general. "Unlike the book or record business, there are no big hits—it's not that kind of industry yet," says Albert Chow, main buyer at Tower Books in Sacramento, Calif. "I think this is because the field is small, and the number of people buying is small, and they buy diverse tapes. We don't have a mass market yet, and so we don't have bestsellers."



Chow believes that educating the consumer about spoken audio is more important in the long run than current sales numbers for any given title. "Bookstores, if they want to increase sales, have to educate the public that the category is available as an option," he says. "Education is more important than sales."

That's why Chow is encouraged by the increasing practice of simultaneous release of audio and hardcover editions. "We're going to put the tape and book side by side," he reports. "The emphasis of this is not so much on sales of the tapes, but to introduce the market to the availability of tapes with bestsellers."

With consumer awareness of spoken audio still below the critical mass needed to create bestsellers, publishers have been forced to focus their strategic thinking on tapping, and exploiting, entire categories of programming, rather than on nurturing individual titles. The continuing popularity of such categories as subliminals and self-help tapes is the clearest expression the market has of consumer interest.

Thus, in the second half of 1988, both Random House and Simon & Schuster introduced lines of subliminal programs. Both houses had previously conceded the subliminal field, and the mysteries of self-hypnosis, largely to independent publishers such as Potentials Unlimited, Metacom and Bright Images.

But the languor with which the rest of the market was developing, and the resulting difficulty of creating bestselling fiction titles, made subliminals finally too big a chunk of the business to ignore. Had the numbers been there for high-profile fiction, or book-based nonfiction titles, Random and S & S might well have continued to ignore subliminals and contented themselves with exploiting their parents' lists without sinking the costs of developing entirely new lines.

Fiction vs. Nonfiction

The emphasis on categories—rather than titles—in 1988 continued to fuel the debate over their relative popularity. The research provided to *PW* shows that if business tapes, self-help, subliminal/self-hypnosis and language tapes are grouped under a "nonfiction" umbrella, then that super-category claims the largest chunk of the trade market (exclusive of direct mail).

Nonfiction claimed 47.8% of the market in 1988, compared to 41% for fiction and 11.3% for children's programming. But, if "nonfiction" is broken into its constituent parts, no one of them is even half as big as the fiction category (see chart).

Though the relative strengths of the various categories was of considerable interest to publishers in 1988, no strong consensus emerged as to the direction the trends were taking. Judging from the results of the bookseller survey, the performance of any given category is a market-by-market phenomenon, rather than an industry-wide trend.

"My sense is that frontlist fiction is the hot category," S & S Audio publisher Dan Roth says. "Overall, it's probably pretty evenly divided between frontlist fiction and what becomes backlist nonfiction, but the big books sell well as audios, which favors the fiction category."

George Hodgkins of Audio Renaissance, a nonfiction publisher, disagrees. "I think the perceived increase in the popularity of fiction is somewhat illusory," he says. "There have been more and more bestselling fiction titles published, so more of it is moving in and out of stores. But I think nonfiction is still stronger, because it has longer legs and a more proven history."

> 'Are we going to see 20% growth in the independent bookstores who have not yet committed to audio? I don't think so.'
>
> —*George Hodgkins, Audio Renaissance*

TDM/McGraw-Hill's Jim Brannigan draws a distinction between long-term appeal and short-term interest. "Fiction will do explosively well for a short period of time," he acknowledges. "But nonfiction is meant to live on the shelf for a long period of time. It's really two subbusinesses within a business, similar to publishing. At retail, you'd better have a healthy mix of both, because certain fiction titles will do well, but nonfiction keeps you in the black."

Retailers seem equally split on the matter. "Fiction is performing better and better," Tower's Albert Chow reports. "Fiction is the up-and-coming category. The general self-help market is pretty saturated, and I think the publishers know that. There are only so many hypnosis tapes you can make." Kroch's & Brentano's v-p Phil Anderson, on the other hand, believes the popularity of fiction is overstated. "I'm constantly hearing that fiction is one of the growth areas," he says. "We frankly have not seen that. We do best in self-help and business."

If one small point of consensus emerged it is that fiction was helped by the trend toward simultaneous release of the audio with the hardcover. "Simultaneous audio and hardcover release has helped *The Cardinal of the Kremlin* [S & S] and *Breathing Lessons* [Random]," Dan Winn, a buyer for the 20-store Bookstop chain in Austin, Tex., says, speaking for many retailers.

Seeking Alternative Distribution

The emphasis on categories influenced another trend trying to emerge in 1988—the development of distribution channels outside the book trade. "You saw a lot of groping for alternative markets in 1988," TDM/McGraw-Hill's Brannigan says. "But by and large I think it met with only limited success. I'm getting some stuff into the record market, but we'll have to wait and see if it sells through."

"From our point of view, the non-book market has to be pursued," Audio Renaissance's Hodgkins says, concurring with the view that the pursuit has been largely unrequited. "That's where the growth is going to come from." According to Hodgkins, the current configuration of the market does not leave much room for growth. "Are we going to see a 20% growth in the independent bookstores who have not yet committed to audio?" he asks, answering "I don't think so. So if you are looking for 20% growth in your business, you have to look outside the trade."

Bantam's Frost believes the successful pursuit of alternative distribution channels will be determined by program categories. "There are some areas where it's working and some where it just hasn't taken hold," she says. "I think many places are more acceptable for nonfiction categories. Subliminals and self-help have real potential outside the trade. But fiction and books-on-tape are really centered around the book reader, and that means the book trade."

Somewhat ironically, one category of programming—unabridged books-on-tape—which had previously been confined largely to the direct mail market, seems to be making a move on the retail trade. In 1988, Dove released an unabridged reading of Stephen W. Hawking's *A Brief History of Time* to the retail trade, as S & S did with Dale Carnegie's *How to Win Friends and Influence People* and NAL did with Stephen King's *The Gunslinger*.

However, Sandy Spencer of Recorded Books, which rents unabridged books-on-tape through the mail, believes any trend in that direction is unlikely to develop much momentum. "The resistance to unabridgement is lessening as consumers are beginning to be aware that there is a choice," he notes. "But," he adds, "price point remains a barrier for unabridgement at retail on any large scale."